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Senegal

Grain and Feed

Annual Rice Report

2004

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Report Highlights:

Post forecasts rice production to increase in 2004/2005 due to expanded cultivated area and increased yields. Despite the locust infestation in the north, the harvest this year will be exceptional due to an increase in area planted. Local rice market share has slightly increased from 9 percent to 11 percent in 2003/2004. Rice imports have decreased 27 percent compared to 2002.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
Annual Report
Abidjan [IV1]
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Executive Summary

Post forecasts increased rice production in 2004/2005 due to area expansion and increased yields. Irrigated rice is grown on a large scale in the Senegal River Valley in the north. Total area planted in this area increased to a record level of 27,772 ha due to expansion in irrigation infrastructure. Senegal has recently experienced the worst locust invasion in more than a decade. However, massive aerial and backpack spraying for the past three months minimized crop losses in this Senegal River Valley region, despite the fact that it was the point of entry of swarms coming from Mauritania. According to officials in SAED (the regional parastatal that administers rice production in the Valley), the locusts did not attack rice production. Problems stemmed instead from endemic pest damage such as grasshoppers and grain-eating birds.

Per capita rice consumption remains at 60-70 kg. Rice consumption is expected to decrease in 2004/05 due to the bumper food crop production. Corn production has reached record levels of 401 TMT (official statistics). Corn is mainly grown in Southern Senegal (Kaolak, Kolda and Tambacounda) where rainfall is greater than in the rest of country. Similarly, sorghum and millet output has also increased (see table).

Senegal is still the second largest African importer of after next to Nigeria. Based on official statistics and projections, Post forecasts Senegalese imports of rice for CY 2004 will decline due to increased local food supplies, to the high price of imported rice, and to stagnant incomes of populations that would demand more rice if they could afford to buy it. Imports during the first ten months of 2004 were 433 MT compared to 568 MT during the same period in 2003. Imports were 710 TMT in CY 2002 and 641 TMT in CY 2003. Ninety-four percent of Senegal's total rice imports are 100 percent broken rice. Thailand is still the major source of imports, followed by India and Vietnam. U.S. rice exports to Senegal were 10 TMT in FY 2003 and were exclusively food aid shipments.

Dakar is a major transshipment point for rice to Mauritania and Mali. According to the Census statistics, the total amount of rice unloaded at the Port of Dakar was 792 TMT in CY 2002 and 825 TMT in CY 2003. The difference between the total unloaded rice at the Port and Senegalese imports represents rice transshipped to neighboring countries. It is estimated that 65 percent of the broken rice imported by Mauritania comes through the port of Dakar.

As of August 31, 2004 rice stocks held by Senegalese rice importers amounted to 114 TMT or the equivalent of 3 months of the country's consumption of rice.

Exchange Rate: U.S. \$1 = 489 F CFA on December 13, 2004.

Production

Post forecasts increased rice production in 2004/2005 due to area expansion, the introduction of high yield varieties, and expanded irrigation infrastructure. Rice production is concentrated in two major areas: the Fleuve region along the Senegal River in the north, where the GOS has made substantial investments in dams and other irrigation infrastructure; and in the southern Casamance region, with a more humid climate and a greater reliance on traditional production techniques. The production in Casamance is primarily subsistence in nature with small-scale irrigation projects at Anambe. The Fleuve region is Senegal's largest rice growing area. It accounts for 67 percent of the country's total rice production. Rice in the Fleuve region is harvested twice a year, during the rainy season when yields are higher (5.5 kg/ha), and during the dry season (5 kg/ha). This year, total area planted during the 2004/05 rainy season reached a record level of 27,774 ha in the North, up from 23,105 ha in 2003/04. The total crop area for rice averages 88,000 ha. Primary estimates for 2004/05 paddy production is 153,687 MT in the Fleuve region, up from 127,076 MT in 2003/04.

In 2004, along with several other West African countries, Senegal experienced the worst locust invasion in more than a decade. However, massive aerial and backpack spraying for the past three months minimized crop attack in the Fleuve region, despite the fact that it was the point of entry of swarms coming from Mauritania. The official government view is that locusts did not attack rice-growing areas. FAS analysis in 2005 will determine the accuracy of this view.

The government of Taiwan has been offering significant aid to the rice sector in Senegal. A new variety of rice called the "TCS10" developed by Taiwanese is making inroads in the local market.

Corn production reached record levels of 401 TMT in 2003/2004. Corn is mainly grown in Southern Senegal (Kaolak, Kolda and Tambacounda) where the rainfall is greater than in the rest of country. Similarly, sorghum and millet output has also increased (see table below).

Table 1: Other Food Crop Production

Crop	Production (1,000 MT)			Area (1,000 HA)		
	2002/03	2003/04	2004/05	2002/03	2003/04	2004/05
Millet	414	628	630	820	857	857
Sorghum	117	190	190	200	208	208
Corn	80	401	350	108	176	180

Source: Ministry of Agriculture, Senegal.

Rice yields averaged 2.6 tons /ha in 2003/2004. Dryland yields range from 1.3 kg/ha to 2 kg/ha. Yields of irrigated rice along the Senegal River Valley at the northern border of the country have improved and are estimated at 5 tons/ha during the dry season and 5.5 tons/ha during the rainy season (June-August).

Consumption

Rice consumption represents 30 percent of cereal consumption in Senegal, equivalent to per capita annual consumption of 60-70 kilograms. Rice consumption is expected to decrease in 2004/05 due to bumper production of other food crops.

Trade

Rice imports are estimated to fall in 2004 due to higher rice prices and freight costs. Imports for the first 10 months of 2004 are 432,785 tons, down from 567,739 tons imported during the same period in 2003. Rice imports decreased 11 percent from 2002 to 2003 from 709,570 tons to 640,739 tons. Senegal continues to import the bulk of its rice from Thailand with India a distant second. Vietnam is the third major source of 100 percent broken rice. Senegal also imports a very small quantity of packaged deluxe rice.

U.S. long grain rice exports amounted to 7,000 tons in 2003 and 10,500 tons in 2004 under the USAID-administered Food for Peace program. The FY 02 and 03 rice was auctioned off to a private wholesaler for distribution throughout the country. The marketing of this long grain rice is hampered by its higher price and by other factors.

PSD Table

Country Senegal						
Commodity		Rice, Milled				
		(1000 HA)(1000 MT)				
		2002	Revised	2003	Estimate	2004
		USDA	Post	USDA	Post	USDA
		Official	Estimate	Official	Estimate	Official
		[Old]	[New]	[Old]	[New]	[Old]
Market Year Begin		08/2002				
Area Harvested	76	76	87	88	87	95
Beginning Stocks	424	250	481	168	476	235
Milled Production	112	112	150	151	130	164
Rough Production	172	172	231	232	200	252
MILLING RATE (.9999)	6500	6500	6500	6500	6500	6500
TOTAL Imports	875	684	825	584	825	500
Jan-Dec Imports	750	710	750	641	750	620
Jan-Dec Import U.S.	1	7	0	7	0	10
TOTAL SUPPLY	1411	1046	1456	903	1431	899
TOTAL Exports	0	0	0	0	0	0
Jan-Dec Exports	0	0	0	0	0	0
TOTAL Dom. Consumption	930	878	980	668	1030	579
Ending Stocks	481	168	476	235	401	320
TOTAL DISTRIBUTION	1411	1046	1456	903	1431	899

Import Trade Matrix

Country Seneg
al

Commodity Rice,
Milled

Time Period Jan-Dec

Imports for: 2002

U.S. 7459

Others

Units: MT

2003

U.S. 0

Others

Thailand	466170	Thailand	448517
India	144250	India	128148
Vietnam	62405	Vietnam	51259

Total for 672825

Others

627924

Others not
Listed 29291

12815

Grand Total 709575

640739